

# Memorandum

**TO:** Public Safety, Finance and  
Strategic Support Committee

**FROM:** Stephen R. Ferguson  
Chief Information Officer

**SUBJECT:** Report on Enterprise Applications -  
Executive Overview of Priority Projects

**DATE:** March 5, 2009

Approved

Date

3/6/09

## RECOMMENDATION

It is recommended that the Public Safety, Finance and Strategic Support Committee accept this Report on Enterprise Applications – Executive Overview of Priority Projects.

## BACKGROUND

This memorandum provides Council with a status update of the Enterprise Content Management (ECM) and Geographical Information Systems (GIS) projects identified in the Citywide Business Technology Update presented at the September 18, 2008, Public Safety, Finance and Strategic Support Committee meeting. Enterprise Content Management and Geographical Information System efforts continue to move forward, yet realities of the current budget situation may impede progress of those projects.

## EXECUTIVE OVERVIEW

### *Enterprise Content Management*

The Information Technology Department (ITD) is currently assisting the organization in its need for increased document and content management. The department has launched two pilot projects for ECM, in addition to engaging a consultant study to evaluate business requirements and the purchase of software tools.

Enterprise Content Management (ECM) includes technologies to capture, manage, store, preserve, and deliver content and documents related to organizational processes. Two primary functions of ECM are to provide electronic document management capabilities and web content management.

Implementing a document management solution is essential in meeting the public's increasing needs and desire for information. This type of system provides the foundation to respond to public records requests in a timely and responsible manner. In addition, the combination of document management and web capabilities allows the organization to take a proactive approach to providing the public with records and information.

Significant growth in the organization's web content and usage by the public continues to drive the need for improved content management software tools and enhanced technical functionality, including updated search capability, workflow analysis and collaboration tools.

Several steps within the ECM strategy have been taken since the previous report to the Committee:

- **Request for Proposal (RFP) for Consultant Services for the Selection of an Enterprise ECM**

The ECM Consultant Services contract was awarded to iMerge Consulting, and work began in September of 2008. This ongoing project is divided into two phases. Phase I, the current phase, includes requirements gathering using comprehensive surveys to collect information from department subject matter and technical experts. Data collection and fit gap analysis is scheduled to complete by the end of May, 2009. Upon completion of the data gathering and fit gap analysis, an RFP for the procurement of software tools should be generated for an ECM solution.

Phase II is planned for the release of an RFP for the procurement of software tools, selection of the initial project(s) and deployment of the ECM technology. Competing priorities, potential staff reductions and budget constraints currently place this project in jeopardy.

- **Pilot ECM Projects**

While a thorough requirements understanding is necessary for a Citywide ECM solution, it is also vitally important that the organization have the capability to execute projects in the short term, and that staff continue to become proficient in the use of these systems. The intent of the pilot projects is to accelerate the transition period for implementation by addressing critical short term requests and by allowing staff to begin detailing and solving the change management issues the organization will ultimately encounter.

*Microsoft SharePoint – Traditional Software/Content Management Pilot*

The Windows SharePoint Services pilot has been implemented and SharePoint has proven to be a useful tool for certain work groups interested in the sharing and collaboration of content. However, SharePoint also has its limitations, particularly in its ability to allow staff to design rich-looking web pages, and to provide navigation elements. While the product may allow for these improvements, it requires customization to support such needs.

This pilot better defined the organization's requirements for a web content management tool. Improved web content management capabilities allow the traditional web coordinator role to focus on providing richer information, and less on mechanics of the creation of content. ITD continues to work with the City Manager's Office to improve policies, and evaluate the organizational needs to implement this type of technology.

ITD is also working with the Fire Department and its vendor to update and improve the Fire Department's internal website using Windows SharePoint Services. The Fire Department's SharePoint intranet site is planned for the Spring of 2009.

- **Request for Proposal (RFP) for Consultant Services for Citywide Web Assessment**

The City of San José recognizes the great value that the World Wide Web ("the web") affords its residents, businesses, visitors, and City Council. The web has become an integral part of communicating information and delivering municipal services. The City has developed over 70 websites and more than 250,000 web pages of information to help meet these objectives. The City has also implemented many on-line services which provide customers with functionality that is easier to use than other methods, and result in conducting City business more quickly. Additionally, through the recent work of the Sunshine Reform Task Force, the City has focused attention on governmental transparency, and recognizes that a critical element in realizing this objectives lies in the its ability to provide information through websites.

The Web Assessment RFP will result in engaging the services of a consultant to help San José examine the details of reaching its goals to provide residents, businesses, visitors and governmental agencies with website services that meet the broad range of informational and service needs. The RFP was issued in December of 2008, and currently the proposals are in the evaluation phase by team members from ITD, the City Manager's Office, Police, Airport and Environmental Services. Work is expected to begin in late Spring 2009.

### ***Geographic Information Systems***

Geographic Information Systems (GIS) combine traditional database information (e.g. address or property owner names) with mapping features such as streets, parcels or pipelines. GIS functionality is used in a variety of applications and provides a rich and powerful environment for such uses as complex demographic analyses, dispatching, and map making.

Work continues in a number of areas to extend and improve the consistency of enterprise-wide information which benefits the City as a whole by allowing equal access to relevant base map and layer information previously held separately by individual offices. ITD continues to work on replacing the current GIS hardware with lower cost hardware. This will reduce the ongoing hardware maintenance and improve performance of the system. This transition is expected to be completed in the Spring of 2009.

The online permits module for Multiple Housing successfully went live in November 2008. The permits module provides efficiencies through additional automation and allows staff to more effectively manage and service thousands of properties that represent the \$3.5 million City revenue stream. The new system streamlines the billing, payment and financial reporting efforts which provide more efficient operation in the Code Enforcement, Finance, Housing and Information Technology Departments. This module replaced an application that was previously running on the legacy VAX system.

- **GIS Manager**

Due to the current budget uncertainty, the recruitment of this position is currently on hold. The GIS Manager was to serve as the key position for administering a Citywide strategy for plan coordination, budgeting, resource allocation and departmental GIS operations. Additionally, this position was also expected to fill an intergovernmental role for improved regional coordination and data sharing opportunities. Although IT considers this position very important, the department's guiding principles in determining budget reductions included elimination of vacancies rather than filled positions. As a result, this vacant position has been proposed for elimination in fiscal year 2009-2010 and the current state of GIS will continue without central coordination.

- **Addressing Re-engineering Project (ARP)**

Property addresses are a key data element in numerous City business systems. Business functions that require locational attributes for billing, noticing, inspecting or public safety response rely on up-to-date, high quality addresses. Currently, three City departments independently maintain separate citywide address identification and maintenance activities within separate departmental processes, standards and computer systems. Consolidation of these activities will reduce cost by eliminating redundancy, and improve service by enhancing consistency and accuracy of data.

Staff has completed a survey of cities of comparable size that have embarked on similar projects. An outcome of this outreach was the discovery of alternative project approaches which could significantly reduce project cost. Staff is currently working with stakeholder departments to document existing processes. Once existing processes are well-understood they may be re-tooled to support a more streamlined and consolidated approach.

## **CONCLUSION**

As the City looks forward to opportunities for the implementation of new technologies, it will need to examine this within the context of current budget limitations and competing priorities. ITD strongly believes that Enterprise Content Management and Geographic Information Systems are two technologies that should be viewed as long term investments, rather than short term expenditures that need to be eliminated. These technologies, as well as many others, provide opportunities for the organization as a whole to work more efficiently. The lack of technology

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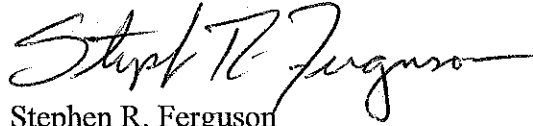
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investment and continual budgetary reductions limit the workforce's ability to be most productive. The Information Technology Department continues to identify and advocate for the efficient use of technology to address immediate and long term needs of the City.

If you have any questions, please contact Steve Turner, Deputy Director of Business Applications at 793-6971.

A handwritten signature in black ink, appearing to read "Stephen R. Ferguson", with a long horizontal flourish extending to the right.

Stephen R. Ferguson  
Chief Information Officer